

BIDGELY FOR SALESFORCE

ENERGY ANALYTICS FOR UTILITIES USING SALESFORCE

OVERVIEW

Bidgely is an AI-powered SaaS solution that enables energy providers to develop a personalized relationship with each customer. With our powerful advanced analytics deployed in 20M+ homes across the world, we help utilities leverage customer intelligence to boost their JD Power and NPS scores, reduce call-center call duration and more. Bidgely is a leading provider of energy analytics for utilities with 17 patents and a continuously innovating platform.

With Bidgely for Salesforce, we're excited to offer Salesforce users the ability to integrate UtilityAI's™ deep energy insights as a means to seamlessly improve customer relationships within the SFDC ecosystem. UtilityAI's flexible and customizable widgets for the Salesforce platform allow utility call center CSRs to access in-depth customer energy consumption data right from each customer's account page in order to offer them personalized recommendations to help save energy and money.

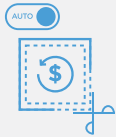
KEY BENEFITS:



Address High-Bill Calls Confidently - Quickly identify if common reasons like weather variations, or user behavior such as a leaky water heater may be at fault for a high bill without having to do a truck roll.



Proactively Prevent High Bill Shock through Energy Efficiency - Utilize the UtilityAI home assessment tool to virtually visit customers homes and provide them with suggestions about how to improve their energy usage.

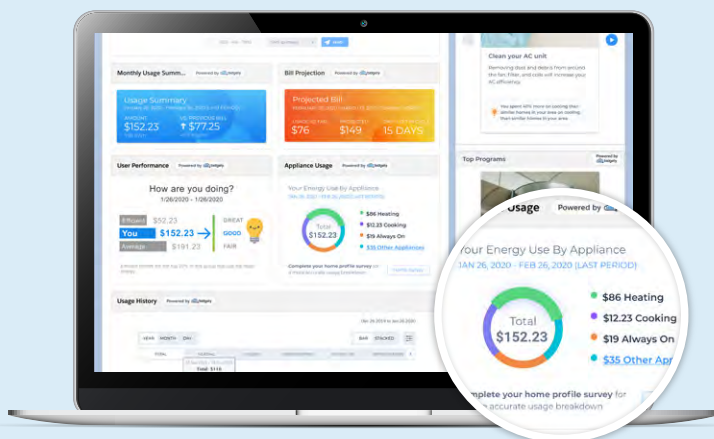


Offer Personalized Energy Recommendations - Leverage UtilityAI's extensive suite of behavioral energy efficiency tips, energy saving products & services and applicable special rate considerations like TOU billing.

BIDGELY FOR SALESFORCE LIGHTING WIDGETS

BILL ANALYZER & ENERGY INSIGHTS

A customer billing breakdown based on the actual presence of appliances on premise. See customer's consumption history based on their appliance breakdown and appliance-level similar home comparison for every customer.

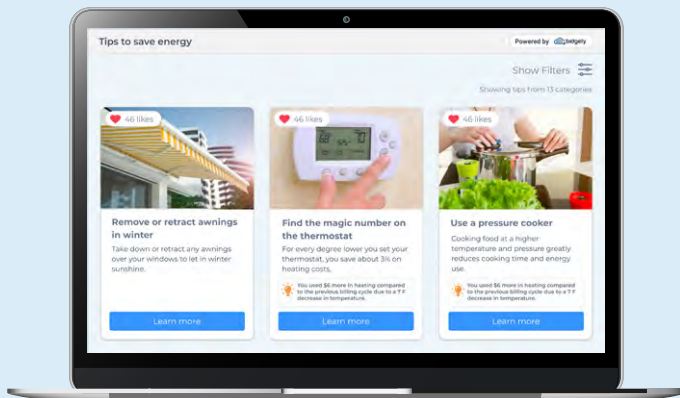




- **Bill Analyzer** - Quickly reveals why the bill might have changed i.e. due to the weather, a variation in consumption by specific appliance categories or the number of days in the billing cycle.
- **Bill Projection** - Forecasts the month-end expected bill amount based on the latest usage patterns and a to-date cost.
- **Load Disaggregation** - Illustrates where customers are spending and using the most energy, providing clues to potentially unusually high usage appliances.
- **Activity Map** - Breaks down usage at the meter read level to determine if certain days and times may be culprits of unusual usage.

NEXT BEST ACTION - RECOMMENDATIONS & PRODUCT REBATES

AI-powered top saving recommendations for customers based on their latest usage patterns, the season, current rates and more. UtilityAI's recommendation engine sorts through hundreds of saving tips and products so that customers are presented only with offers that make sense for their income, usage efficiency and lifestyle.

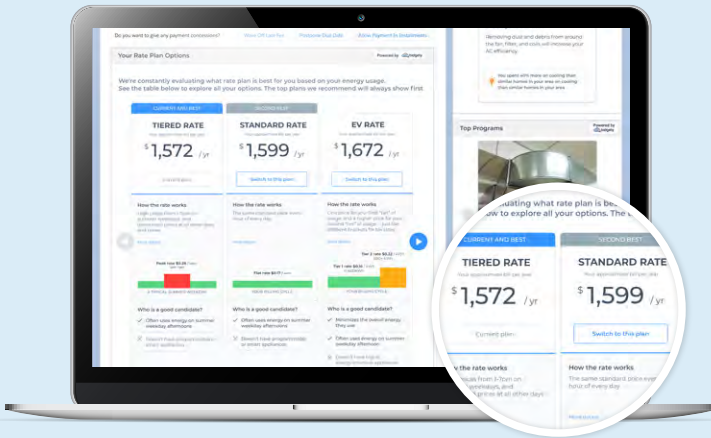


- **Education** - Evaluates customer energy efficiency in comparison with their peers.
- **Products & Services** - Details current rebates and special discounts for which a customer is eligible.
- **Demand Side Management Programs** - Promotes any demand response or special assistance programs for which a customer is a good candidate, based on their usage patterns.
- **Behavioral Tips** - Highlights actions customers can take in the home to better manage their energy costs.

RATE ANALYSIS

Rate comparison engine for each customer outlining available rate plans together with the best recommended rate based on their historical usage.

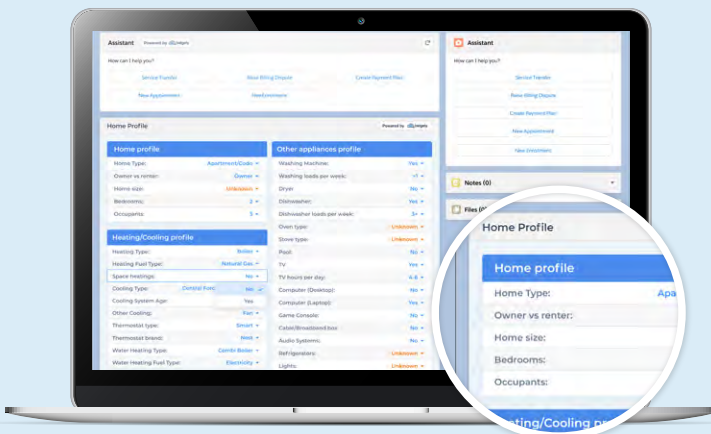
- Provides details on rate plan criteria, implications and best candidates for each type of rate.
- Automatically updates the analysis based on any new home profile and additional information provided by the customer or CSR.
- Removes guess work for both CSRs and customers.

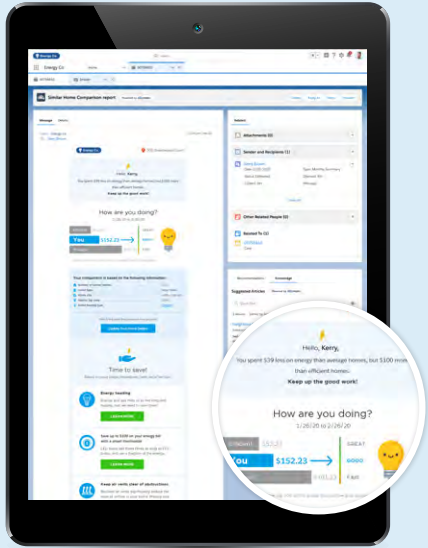


REMOTE AUDIT

The home profile widget empowers agents to spot any missing home profile fields at a glance and complete it quickly with customer input to secure a more personalized energy insights and recommendations experience in the future.

- UtilityAI pre-populates customer home profiles.
- Tool is easily shareable to third party implementers partnered in Salesforce.





ALERT ENROLLMENT & PREFERENCES

The engagement widget helps CSRs see the 360 view of the customer's interactions by tracking communications sent via the UtilityAI platform or other messaging tools. Customer communication preferences for specific alerts, email and SMS can also be configured here. Proactively enrolling customers into bill projection alerts has shown to significantly reduce high bill calls.

SUCCESS METRICS



50%
Reduction in
High Bill Call



3 MIN
Reduction in High
Bill Call Handle Time

Read about how one customer took their call center to the next level:

<https://go.bidgely.com/Virtual-Assessment-Field-Audits-CARE-CaseStudy.htm>

Check out the app for yourself [HERE](#)

